



Sandata EVV Visit Maintenance

Intended Audience: Agency Providers and Non-Agency Providers

NOTE: This webinar will begin 5 minutes after the start time.

Developed September 2021

Sound Test



We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

This presentation is intended solely for non-agency providers and agency providers that are using the Sandata Electronic Visit Verification (EVV) system, provided by the state, to record visits. Agency providers using an alternate vendor for visit capture and management need to make all edits in their Alternate EVV system.

Agenda

- Terms and Definitions
- Visit Maintenance Filter and Sort
- Visit Review Grid
- Resolving Visit Exceptions
- Resources
- Questions

Terms and Definitions

Terms and Definitions

Visit Maintenance: The module within Sandata EVV where visits can be edited and managed

Agency Provider: An entity that provides care to an individual and records services using EVV

Non-Agency Provider: An individual provider who provides care and records services using EVV

Terms and Definitions

Sandata EVV Portal: The online portal used by agency and non-agency providers to manage Sandata EVV visits and records

Sandata Mobile Connect (SMC): Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on a Sandata EVV device

Exception: A notification on a visit in the EVV portal that tells a provider that there is something they need to review on the visit



Terms and Definitions

Client: An individual who receives services subject to EVV requirements

Employee: The person who provided care during the visit

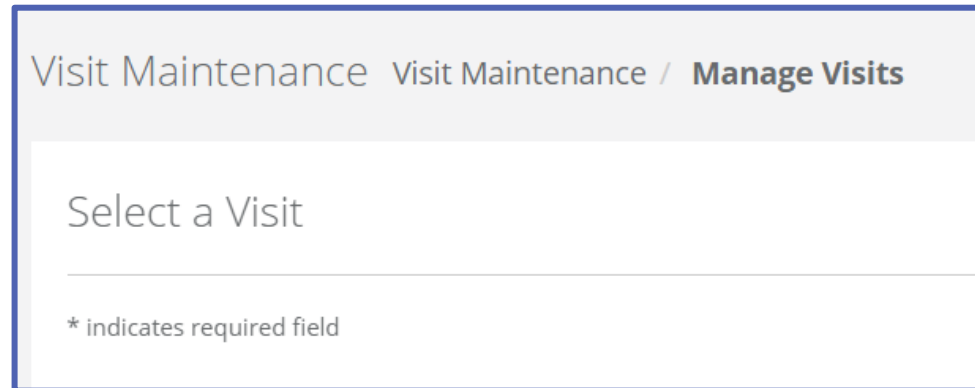
User: A person with a unique login and password to the Sandata EVV portal

Visit Maintenance Filter and Sort

Visit Maintenance Filter and Sort

You can use the filter and sort options to search for specific visits

- For example, if a caregiver is unable to call out on a specific day, you can look for just that one day using the filter and sort options



Visit Maintenance Visit Maintenance / **Manage Visits**

Select a Visit

* indicates required field



Reminder: Visit Maintenance is only available to users of the EVV portal

Filter and Sort– Date Range

In the date range field:

- Type the date in MM/DD/YYYY format, or
- Click on the blue calendar icon for an interactive calendar
- If the Date Range filters are not changed, only visits logged for the current date will appear

DATE RANGE * MM/DD/YYYY

10/07/2021  to 10/07/2021 

PAYER

Select Payer

VISIT STATUS

Select Visit Status

OCTOBER 2021

OCTOBER 2021						
<<	<	TODAY			>	>>
SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Filter and Sort – Optional Filters

These filters are optional, and can be left blank

Select a Visit

CREATE CALL

* indicates required field

DATE RANGE * MM/DD/YYYY

10/07/2021

to

10/07/2021

PAYER

Select Payer

PROGRAM

Select Program

VISIT STATUS

Select Visit Status

CLIENT MEDICAID ID

Enter Client Medicaid ID

CLIENT

Enter Client

EMPLOYEE

Enter Employee

SERVICE

Select Service

CATEGORY

Select Category

FILTER VISITS BY

All Exceptions

Show advanced filter options



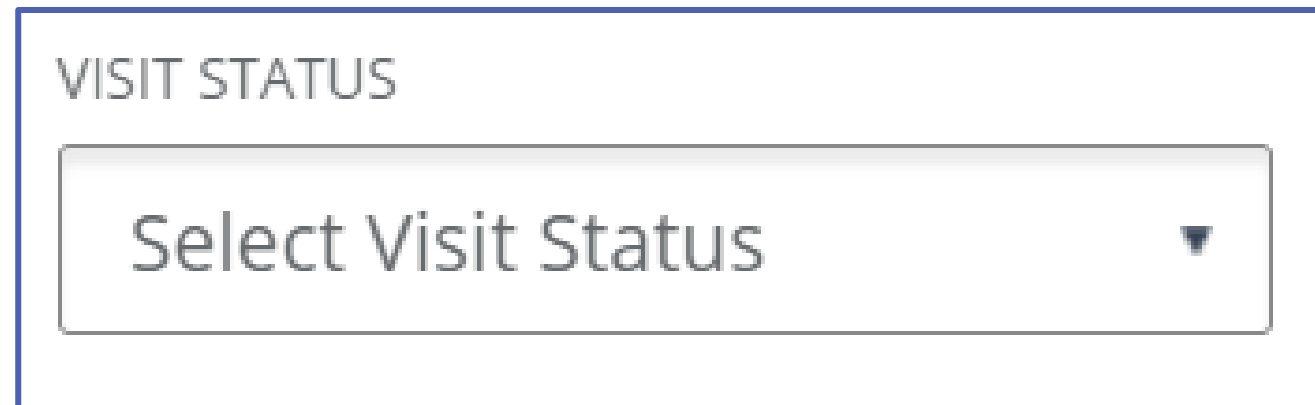
Filter and Sort – Optional Filters

While certain filters are not required, they can be used to search for a specific visit or set of visits:

- Client (Last Name, First Name)
- Employee (Last Name, First Name)
- Payer
- Program
- Service
- Category
- Client Medicaid ID number

Filter and Sort – Visit Status

The default selection for the Visit Status filter is “Select Visit Status.” This means all visit statuses will be included in your search if you do not define just one for which to search.

A screenshot of a web interface showing a filter for 'VISIT STATUS'. The filter is a dropdown menu with the text 'Select Visit Status' and a downward-pointing arrow. The entire filter box is enclosed in a blue rectangular border.

VISIT STATUS

Select Visit Status ▼

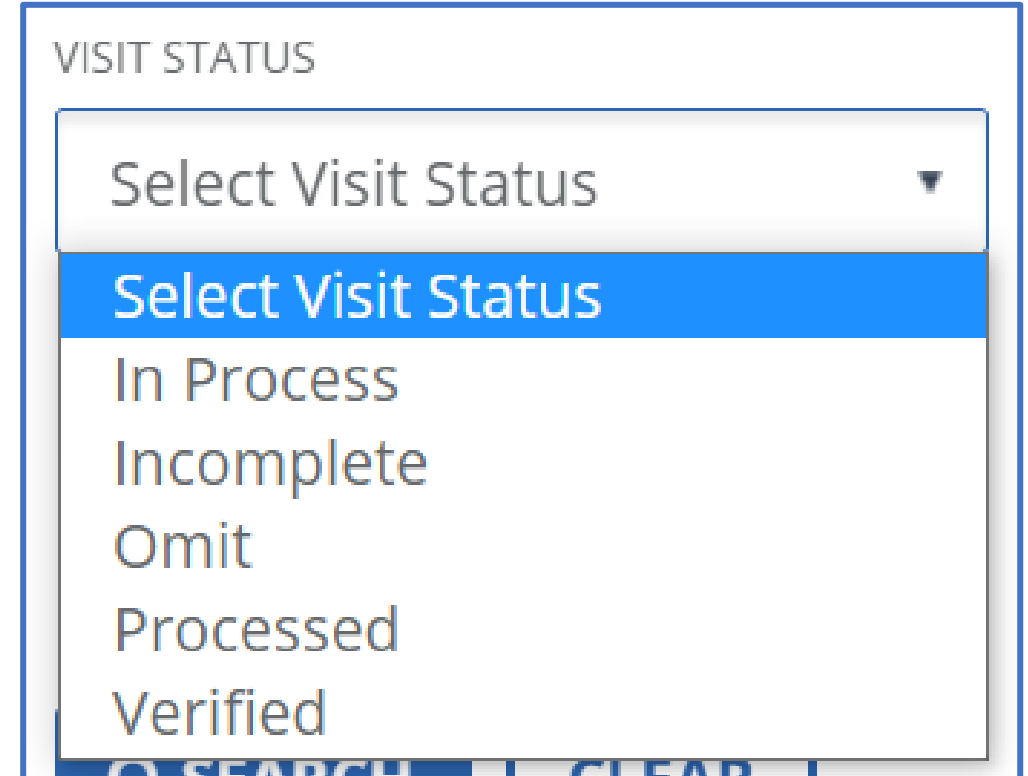
Filter and Sort – Visit Status

In Process: The visit is still occurring

**If a visit is not ended by a caregiver, the status of the visit will change to Incomplete after 24 hours.*

Incomplete: The visit has missing information, or something needs the provider's attention on the visit

Omit: The provider does not intend to bill for the visit, and they have marked it as “do not bill” in the EVV portal

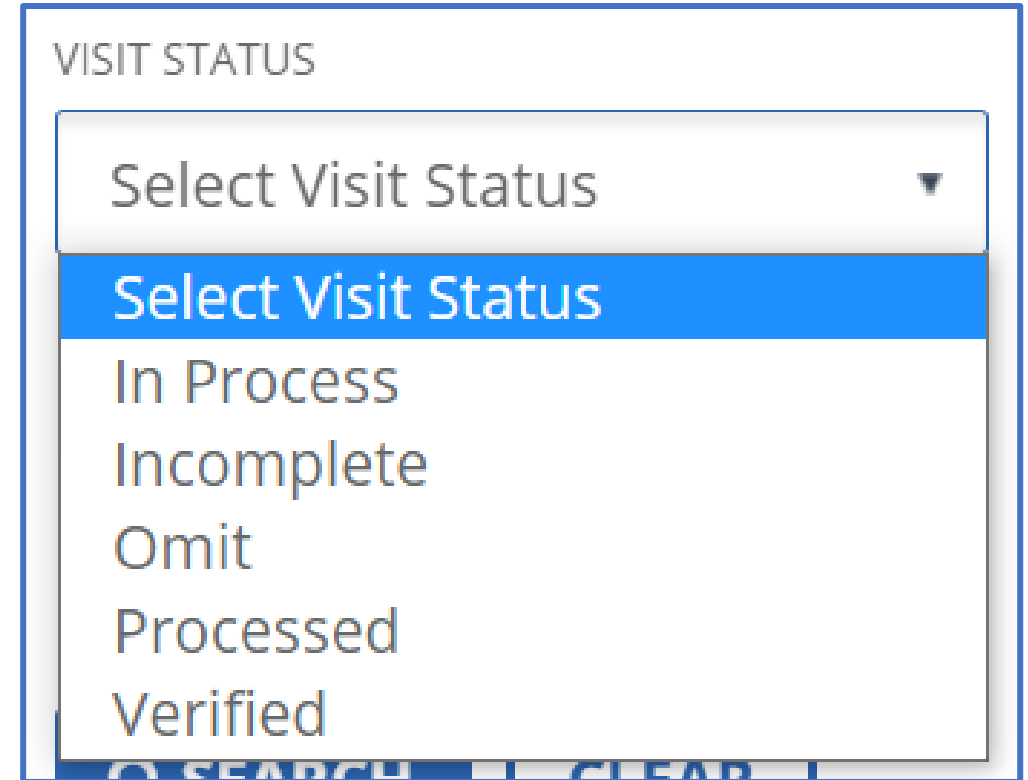


The screenshot shows a web interface for managing visit status. At the top, the text "VISIT STATUS" is displayed. Below it is a dropdown menu with the placeholder text "Select Visit Status" and a downward arrow. The dropdown is open, showing a list of options: "Select Visit Status" (highlighted in blue), "In Process", "Incomplete", "Omit", "Processed", and "Verified". At the bottom of the interface, there are buttons for "SEARCH" and "CLEAR".

Filter and Sort – Visit Status

Verified: The visit does not contain any exceptions

Processed: The visit has been matched with a claim



A screenshot of a web application interface showing a dropdown menu for 'VISIT STATUS'. The menu is open, displaying a list of options. The first option, 'Select Visit Status', is highlighted in blue. Below it are the options 'In Process', 'Incomplete', 'Omit', 'Processed', and 'Verified'. The text 'SEARCH' and 'CLEAR' are partially visible at the bottom of the menu.

VISIT STATUS	
Select Visit Status	▼
Select Visit Status	
In Process	
Incomplete	
Omit	
Processed	
Verified	

Filter and Sort – Filter Visits By

The default selection for Filter Visits By filter is “All Exceptions”

FILTER VISITS BY

All Exceptions ▼

Filter and Sort – Filter Visits By

All Exceptions: Show only visits with missing or inaccurate information

Exception Types: Show only visits that have specific missing or inaccurate information

All Visits: Show all visits, including those with and without exceptions

FILTER VISITS BY

All Exceptions ▼

All Exceptions

Exception Types

All Visits

Filter and Sort – Filter Visits By

Select one or more exception types to filter results

For example, you search for only visits that are missing call ins and call outs

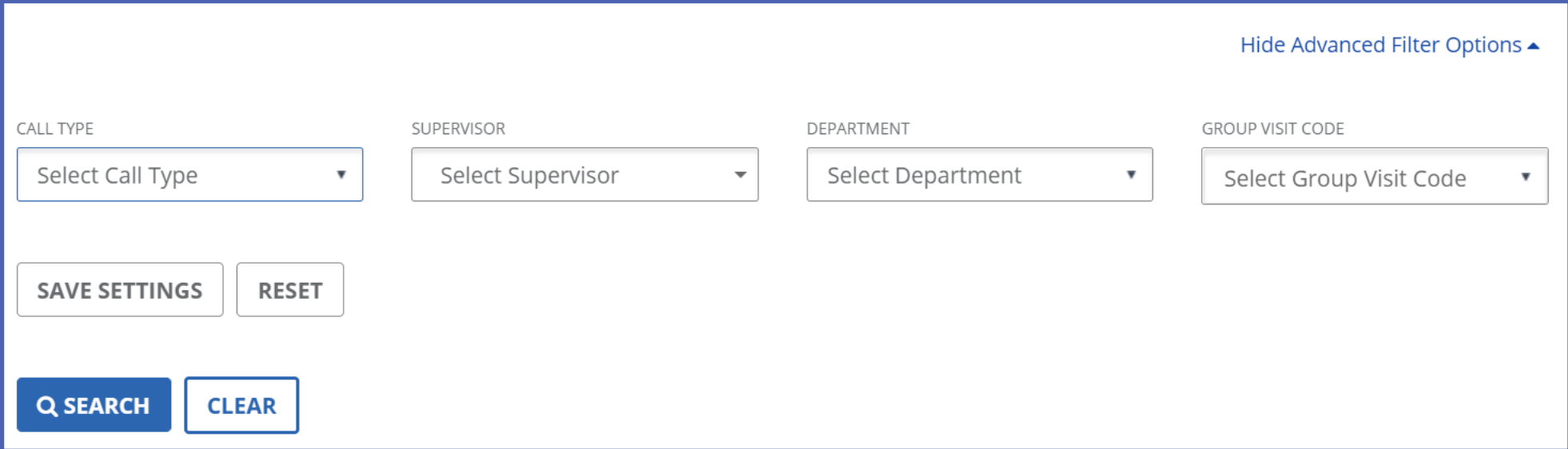
EXCEPTION TYPES *

Select Exception Type ▼

- ☐ MISSING SERVICE
- ☐ UNAUTHORIZED SERVICE
- ☐ UNKNOWN CLIENTS
- ☐ UNKNOWN EMPLOYEES
- ☐ VISITS WITHOUT IN-CALLS
- ☐ VISITS WITHOUT OUT-CALLS

Filter and Sort – Advanced Filter Options

The advanced filter options are also optional, and can be left blank



The screenshot displays the 'Advanced Filter Options' section of a web application. It features four dropdown menus for filtering: 'CALL TYPE' (labeled 'Select Call Type'), 'SUPERVISOR' (labeled 'Select Supervisor'), 'DEPARTMENT' (labeled 'Select Department'), and 'GROUP VISIT CODE' (labeled 'Select Group Visit Code'). Each dropdown has a small downward arrow on its right side. Below these filters are two buttons: 'SAVE SETTINGS' and 'RESET'. At the bottom left, there are two more buttons: 'Q SEARCH' (in blue) and 'CLEAR' (in white with a blue border). In the top right corner of the filter area, there is a link that says 'Hide Advanced Filter Options' with an upward-pointing triangle icon.

Click SEARCH when you are ready to search for visits

Visit Review Grid

Visit Review Grid

This is the Visit Review Grid

ROWS PER PAGE:

10

Show Display Options

«

<

1

2

3

4

5

>

»

Showing 1 to 10 of 114 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill
Six, Test	Thomas, Jackson	HPC	09/09/2021	12:10 PM	12:15 PM	00:05	12:10 PM	12:15 PM		00:05	Verified	<input type="checkbox"/>
gilmores, happy	Thomas, Jackson	HPC	09/09/2021	12:10 PM	12:15 PM	00:05	12:10 PM	12:15 PM		00:05	Verified	<input type="checkbox"/>
Client, JT	Thomas, Jackson	HPC	09/09/2021	12:09 PM	12:15 PM	00:06	12:09 PM	12:15 PM		00:06	Verified	<input type="checkbox"/>
Six, Test	Employee, Maria	HPC	09/09/2021	12:03 PM	12:06 PM	00:03	12:03 PM	12:06 PM		00:03	Verified	<input type="checkbox"/>
gilmores, happy	Employee, Maria	HPC	09/09/2021	12:02 PM	12:06 PM	00:04	12:02 PM	12:06 PM		00:04	Verified	<input type="checkbox"/>
Client, JT	Employee, Maria	HPC	09/09/2021	12:02 PM	12:06 PM	00:04	12:02 PM	12:06 PM		00:04	Verified	<input type="checkbox"/>

Each row is one visit, and each column is a summary visit details



Visit Review Grid

You can change how many visits you see on a single page, and see the total number of visits based on your search

ROWS PER PAGE:

10 ▼

Show Display Options ▼

Showing 1 to 10 of 114 entries

Visit Review Grid

Use Show Display Options to change the columns in your Visit Grid

ROWS PER PAGE: 10

Show Display Options ▼

X

<input checked="" type="checkbox"/> Adjusted Hours	<input type="checkbox"/> Client Medicaid ID	<input type="checkbox"/> Memo
<input checked="" type="checkbox"/> Adjusted In	<input checked="" type="checkbox"/> Client Name	<input type="checkbox"/> Payer
<input checked="" type="checkbox"/> Adjusted Out	<input type="checkbox"/> Client Primary Phone Number	<input type="checkbox"/> Program
<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Client Verified	<input type="checkbox"/> Santrax ID
<input checked="" type="checkbox"/> Bill Hours	<input checked="" type="checkbox"/> Do Not Bill	<input checked="" type="checkbox"/> Service
<input checked="" type="checkbox"/> Call Hours	<input type="checkbox"/> Employee Contact Phone Number	<input type="checkbox"/> Supervisor
<input checked="" type="checkbox"/> Call In	<input type="checkbox"/> Employee ID	<input type="checkbox"/> Units
<input checked="" type="checkbox"/> Call Out	<input checked="" type="checkbox"/> Employee Name	<input checked="" type="checkbox"/> Visit Date
<input type="checkbox"/> Claims Verification Status	<input type="checkbox"/> Exported	<input type="checkbox"/> Visit Location
<input type="checkbox"/> Client ID	<input type="checkbox"/> Group Visit Code	<input checked="" type="checkbox"/> Visit Status



Visit Review Grid

To save your display options and your filter and sort fields, click Save Settings under the Advanced Filter Options

Hide Advanced Filter Options ▲

CALL TYPE

Select Call Type ▼

SUPERVISOR

Select Supervisor ▼

DEPARTMENT

Select Department ▼

GROUP VISIT CODE

Enter Group Visit Code

SAVE SETTINGS

RESET

Resolving Visit Exceptions

Visit Exceptions

- ☐ MISSING SERVICE
- ☐ UNAUTHORIZED SERVICE
- ☐ UNKNOWN CLIENTS
- ☐ UNKNOWN EMPLOYEES
- ☐ VISITS WITHOUT IN-CALLS
- ☐ VISITS WITHOUT OUT-CALLS

Visit Exceptions

Missing Service – There is no service on the visit

Unauthorized Service – The service on the visit does not match the client record

Unknown Client – There is no individual record information connected to the visit

Visit Exceptions

Unknown Employee – There is no caregiver record information connected to the visit (this is for agencies only)

Missing Call In – There is no call in connected to the visit

Missing Call Out – There is no call out connected to the visit

Missing or Unauthorized Service

Missing or Unauthorized Service

1. On the navigation panel, click **Data Entry**, then click **Clients**
2. Search for the client record, then click the pencil icon next to the client's name to open the record details
3. Note the payer, program, and service in the client record, or add if the data does not exist, and save the client record if changes were made

Missing or Unauthorized Service

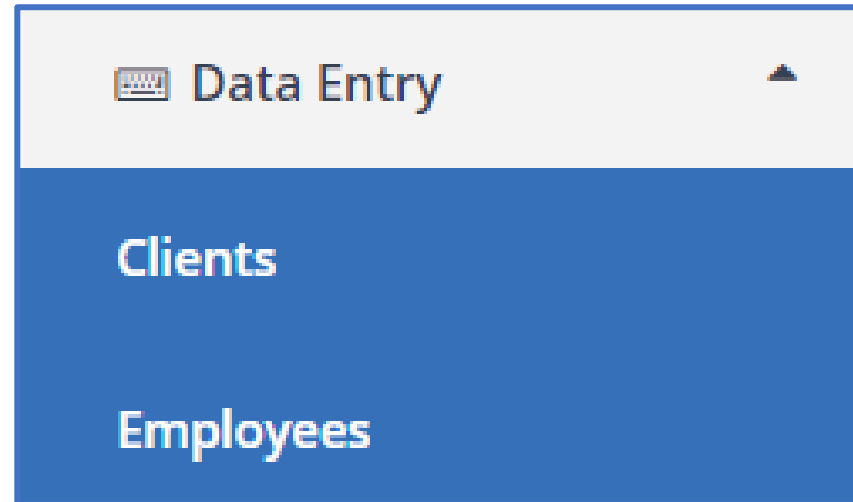
Note: If the client record was modified to match the visit, you do not need to complete steps 4 and 5. The visit will refresh and clear the service exception.

4. On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**
5. Modify the payer, program, and service to match the client record, enter a reason code, resolution code, and reason note (if required), then click **Save**



Missing or Unauthorized Service

On the navigation panel, click **Data Entry**, then click **Clients**



Missing or Unauthorized Service

Search for the client record, then click the pencil icon next to the client's name to open the record details

Search Clients

CREATE CLIENT

CLIENT LAST NAME

Enter Client Last Name

CLIENT FIRST NAME

thomas

CLIENT ID

Enter Client ID

CLIENT MEDICAID ID

Enter Client Medicaid ID

STATUS



Active

Q SEARCH

CLEAR

ROWS PER PAGE: 20

Showing 1 to 1 of 1 entries

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
Doe	Thomas	140112	888928392839	Active	 



Missing or Unauthorized Service

Note the payer, program, and service in the client record, or add if the data does not exist, and save the client record if changes were made

Client Payer

Add New

History

FROM DATE	TO DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
02/22/2021			DODD	DD	HPC	 

Showing 1 to 1 of 1 entries

«

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1

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SAVE

CANCEL



Missing or Unauthorized Service

On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**



Select a Visit

CREATE CALL

* indicates required field

DATE RANGE * MM/DD/YYYY

01/01/2021

to

08/12/2021

CLIENT

doe, thomas

EMPLOYEE

Enter Employee

CATEGORY

Select Category

PAYER

Select Payer

PROGRAM

Select Program

SERVICE

Select Service

VISIT STATUS

Select Visit Status

CLIENT MEDICAID ID

Enter Client Medicaid ID

FILTER VISITS BY

All Visits



Missing or Unauthorized Service

On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status
Doe, Thomas	Doe, John	OHCW PCA (T1019)	06/01/2021	02:00 PM	04:30 PM	02:30				02:30	Incomplete

Missing or Unauthorized Service

On the navigation panel, click **Visit Maintenance**, locate the visit, open the visit details, then click **General**

Visit Details

Visit From Date: 06/01/2021

CLIENT NAME

CLIENT ID #

MEDICAID ID #

EMPLOYEE NAME

EMPLOYEE ID #

Doe, Thomas

140112

888928392839

Doe, John

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT FROM DATE

VISIT TO DATE

VISIT TIME ZONE

VISIT STATUS

06/01/2021

06/01/2021

US/Eastern

Incomplete

CALL IN

CALL OUT

CALL HOURS

UNITS

02:00 PM

04:30 PM

02:30

10

ADJUSTED IN DATE

ADJUSTED IN HH:MM AM/PM

ADJUSTED OUT DATE

ADJUSTED OUT HH:MM AM/PM

06/01/2021

02:00 PM

06/01/2021

04:30 PM

AGENCY ID

AGENCY NAME

BILL HOURS

25090

Test p1 to p2 Agency

02:30

PAYER

PROGRAM

SERVICE

GROUP VISIT CODE

ODM

OHC

OHCW PCA (T101

CLIENT VERIFIED TIME

CLIENT VERIFIED SERVICE

CLIENT SIGNATURE

No

No

No

VISIT SOURCE

SANDATA

DO NOT BILL

APPROVED

GENERATE GROUP VISIT CODE



Missing or Unauthorized Service

Modify the payer, program, and service to match the client record, enter a reason code, resolution code, and reason note (if required), then click **Save**

The diagram illustrates the process of modifying service information. It shows two states of a form: an initial state and a modified state, connected by a large blue arrow. Below these, a separate section shows the reason code, resolution code, and reason note fields, along with a 'SAVE' button.

Initial State (Left):

- PAYER: ODM
- PROGRAM: OHC
- SERVICE: OHCW PCA (T101)

Modified State (Right):

- PAYER: DODD
- PROGRAM: DD
- SERVICE: HPC

Reason Code, Resolution Code, and Reason Note Section:

- REASON CODE *: 40 Telephony Iss
- RESOLUTION CODE *: Written Documei
- REASON NOTE: Reason Note
- SAVE**

Unknown Client

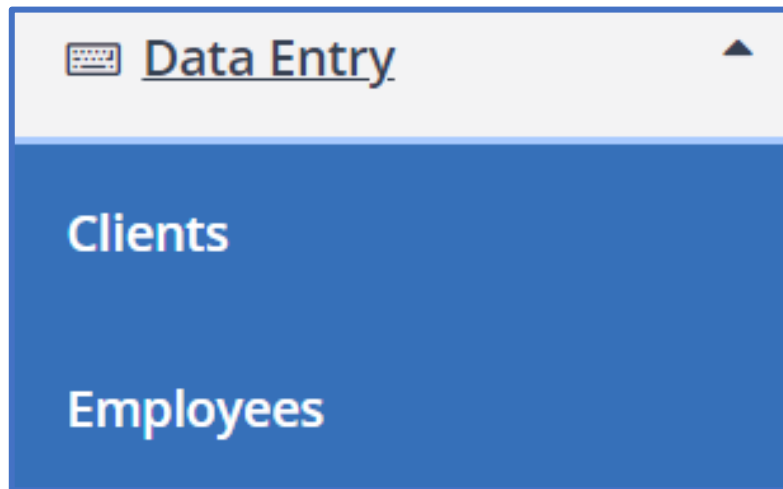
Unknown Client

1. In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Client**
2. Use one or more fields to search for the client record
3. Click the radio button next to the client record that you would like to add to the visit.
4. Enter a reason code, resolution code, and reason note (if required)
5. Click **Save**



Unknown Client

Note: If the client record has not been created, all visits will show an unknown client exception. If this is happening in your system, click Data Entry > Clients , then click Create Client in the upper right-hand corner of the screen.



Unknown Client

In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Client**

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Home	Adjusted In	Adjusted Out	Adjusted Home	Bill Home	Visit Status
	Thomas, Jackson	Passport - Consumer Directed Personal Care (T1019) 	01/04/2021	12:15 PM	12:20 PM						

Visit Details

Visit From Date: 01/04/2021

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
			Thomas, Jackson	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME

FIRST NAME

CLIENT ID #

Enter Last Name

Enter First Name

Enter Client ID #

CLIENT MEDICAID ID

☐ INCLUDE INACTIVE CLIENTS

Q

Enter Client Medicaid ID



Unknown Client

Use one or more fields to search for the client record

Find Client

LAST NAME	FIRST NAME	CLIENT ID #
<input type="text" value="Doe"/>	<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Client ID #"/>
CLIENT MEDICAID ID		
<input type="text" value="Enter Client Medicaid ID"/>	<input type="checkbox"/> INCLUDE INACTIVE CLIENTS	
<input type="button" value="Q"/>		

NOTE: You may also leave these fields blank and click **Search** to see a list of all clients in your EVV portal



Unknown Client

Click the radio button next to the client record that you would like to add to the visit

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input checked="" type="radio"/>	Doe	Thomas	140112		888928392839

Showing 1 to 1 of 1 entries

«<1>»

Unknown Client

Enter a reason code, resolution code, and reason note (if required), then click **Save**

REASON CODE *	RESOLUTION CODE *	REASON NOTE	SAVE
30 Device Issue ▼	Written Docume ▼	Reason Note	

Unknown Employee

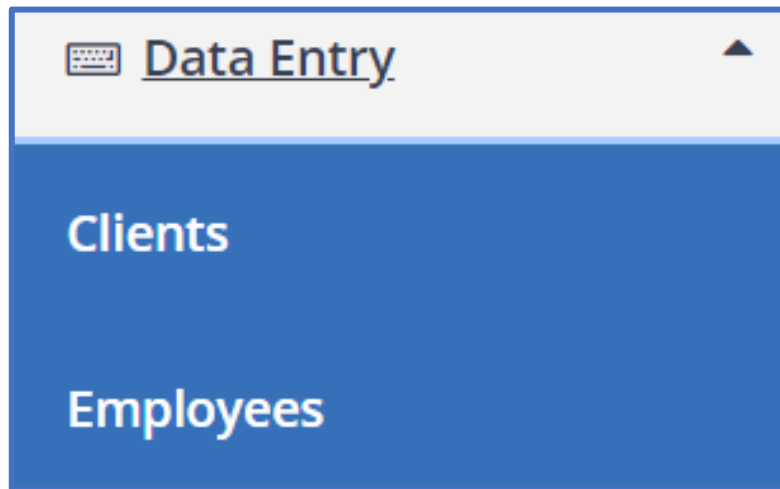
Unknown Employee

1. In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Employee**
2. Use one or more fields to search for the employee record
3. Click the radio button next to the employee record that you would like to add to the visit
4. Enter a reason code, resolution code, and reason note (if required).
5. Click **Save**



Unknown Employee

Note: If the employee record has not been created, all visits will show an unknown client exception. If this is happening in your system, click Data Entry > Employees, then click Create Employee in the upper right-hand corner of the screen.



Unknown Employee

In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Employee**

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call	Adjusted	Adjusted	Adjusted	Bill	Visit
Client, JT			07/21/2021	03:54 PM							

Visit Details

Visit From Date: 07/21/2021

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Client, JT	776249	222211111111		

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Employee has been associated with this visit.
Find Employee
LAST NAME
First Name
EMPLOYEE ID #
DISCIPLINE
Last Name
First Name
Employee ID #
Select Discipline
☐ INCLUDE INACTIVE EMPLOYEE
Q



Unknown Employee

Use one or more fields to search for the employee record

Find Employee

LAST NAME	FIRST NAME	EMPLOYEE ID #	DISCIPLINE
<input type="text" value="Thomas"/>	<input type="text" value="First Name"/>	<input type="text" value="Employee ID #"/>	<input type="text" value="Select Discipline"/>

☐ INCLUDE INACTIVE EMPLOYEE

Q

NOTE: You may also leave these fields blank and click **Search** to see a list of all employees in your EVV portal.

Unknown Employee

Click the radio button next to the employee record that you would like to add to the visit

Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input checked="" type="radio"/>	Thomas	Jackson		000447351	

Showing 1 to 1 of 1 entries

«<1>»

Unknown Employee

Enter a reason code, resolution code, and reason note (if required), then click **Save**

REASON CODE *	RESOLUTION CODE *	REASON NOTE	SAVE
30 Device Issue ▼	Written Docume ▼	Reason Note	

Adding Missing Calls

Adding Missing Calls – Call In/Call Out

If a visit is missing a beginning time (Call In) or end time (Call Out), then the time will need to be added before the visit can be in a Verified status.

- Visit without in-call
- Visit without out-call

Adding Missing Calls – Call In/Call Out

1. In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Call Log**
2. Enter the missing date and time
3. Enter a reason code, resolution code, and reason note (if required)
4. Click **Save**

Adding Missing Calls – Call In/Call Out

In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Call Log**

Client, JT

Andrea, Test

Participant-Directed
Homemaker-
Personal
Care

09/30/2021

10:00
AM

Visit Details

Visit From Date: 09/30/2021

CLIENT NAME

Client, JT

CLIENT ID #

776249

MEDICAID ID #

222211111111

EMPLOYEE NAME

Andrea, Test

EMPLOYEE ID #

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

CALL IN

CLIENT ID# 0000776249

CALL DATE

09/30/2021

CALL TIME

10:00 AM

CALL TYPE

Manual Call

SERVICE

Participant-Directed
Homemaker-Personal
Care

USER

CALL SOURCE

SANDATA

TIME ZONE

US/Eastern

Add Manual Call

* indicates required field

CALL DATE * MM/DD/YYYY

MM/DD/YYYY

CALL TIME * HH:MM AM/PM

11:04 AM

SERVICE

Select Service

TIME ZONE

US/Eastern

REASON CODE *

Select Reason Coc


RESOLUTION CODE


Select Resolution

REASON NOTE

Reason Note

ADD







Adding Missing Calls – Call In/Call Out

Enter the missing date and time using the pop-up calendar, or enter the date, time, and service in the appropriate fields

Add Manual Call

* indicates required field

CALL DATE * MM/DD/YYYY	CALL TIME * HH:MM AM/PM	SERVICE	TIME ZONE
<input type="text" value="MM/DD/YYYY"/> 	<input type="text" value="11:04 AM"/> 	<input type="text" value="Select Service"/> ▼	<input type="text" value="US/Eastern"/> ▼

Adding Missing Calls – Call In/Call Out

Enter a reason code, resolution code, and reason note (if required), then click **Add**

REASON CODE *	RESOLUTION CODE *	REASON NOTE	
30 Device Issue ▼	Written Documen ▼	Reason Note	ADD

Adding Missing Calls – Create Manual Call

If a visit occurs but is not recorded at all during the time of care, a manual call will need to be created in Sandata EVV. To add a manual call:

1. Click Create Call
2. Select a client record, then click Next
3. *Agencies only - select an employee record , then click Next*
4. Add the start date, time, and service, then click Finish
5. Search for the visit in visit maintenance and open the visit details
6. Add the call out time from the call log



Adding Missing Calls – Create Manual Call

Click Create Call

Select a Visit CREATE CALL

* indicates required field

DATE RANGE * MM/DD/YYYY		CLIENT	EMPLOYEE
09/01/2021	to 09/30/2021	Enter Client	Enter Employee
PAYER	PROGRAM	SERVICE	CATEGORY
Select Payer	Select Program	Select Service	Select Category
VISIT STATUS	CLIENT MEDICAID ID	FILTER VISITS BY	EXCEPTION TYPES *
Select Visit Status	Enter Client Medicaid ID	Exception Types	Visits Without In-Calls, Visits



Adding Missing Calls – Create Manual Call

Select a client record, then click **Next**

Select Client

CLIENT FIRST NAME

CLIENT LAST NAME

CLIENT MEDICAID ID

CATEGORY

SUPERVISOR

PAYER

LAST ACTIVE DATE

Q SEARCH

CLEAR

Client ID	Client Name	Client Medicaid ID	Supervisor	Select
901626	Doe, Jessica	110001230230		<input checked="" type="radio"/>

«

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»

PREVIOUS

NEXT

CANCEL



Adding Missing Calls – Create Manual Call

Agencies only – select an employee record, then click **Next**

Select Employee

EMPLOYEE FIRST NAME

John

EMPLOYEE LAST NAME

Doe

☐ LAST ACTIVE DATE

Q SEARCH

CLEAR

Employee ID	Employee Name	Select
	Doe, John	<input type="radio"/>

«

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1

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»

PREVIOUS

NEXT

CANCEL



Adding Missing Calls – Create Manual Call

Add the start date, start time, and service, then click **Finish**

Set Date and Time

* indicates required field

CALL DATE * MM/DD/YYYY

10/07/2021

CALL TIME * HH:MM AM/PM

10:00 AM

TIME ZONE

US/Eastern

SERVICE

PDN (T1000)

GENERATE GROUP VISIT CODE

PREVIOUS

FINISH

CANCEL



Adding Missing Calls – Complete Manual Call

In Sandata EVV Visit Maintenance, click on the visit to open the visit details popup, then click **Call Log**

Client, JT	Andrea, Test	Participant-Directed Homemaker- Personal Care	09/30/2021	10:00 AM	●
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Visit Details

Visit From Date: 09/30/2021

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Client, JT	776249	222211111111	Andrea, Test	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

CALL IN

CLIENT ID# 0000776249

CALL DATE	CALL TIME	CALL TYPE	SERVICE
09/30/2021	10:00 AM	Manual Call	Participant-Directed Homemaker-Personal Care
USER	CALL SOURCE		
	SANDATA		
TIME ZONE			
US/Eastern			

Add Manual Call

* indicates required field

CALL DATE * MM/DD/YYYY

MM/DD/YYYY

CALL TIME * HH:MM AM/PM

11:04 AM

SERVICE

Select Service

TIME ZONE

US/Eastern

REASON CODE *

Select Reason Coc

RESOLUTION CODE

Select Resolution

REASON NOTE

Reason Note

ADD



Sandata

Adding Missing Calls – Complete Manual Call

Enter the missing date, time, and service

Add Manual Call

* indicates required field

CALL DATE * MM/DD/YYYY	CALL TIME * HH:MM AM/PM	SERVICE	TIME ZONE
<input type="text" value="MM/DD/YYYY"/> 	<input type="text" value="11:04 AM"/> 	<input type="text" value="Select Service"/> ▼	<input type="text" value="US/Eastern"/> ▼

Adding Missing Calls – Complete Manual Call

Enter a reason code, resolution code, and reason note (if required), then click **Add**

REASON CODE *	RESOLUTION CODE *	REASON NOTE	ADD
30 Device Issue ▼	Written Document ▼	Reason Note	

Resources

Resources

Agency Provider Resources

- Agency EVV Training Manual
<https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Agency-Guide.pdf>
- Agency EVV Video Library
<https://fast.wistia.net/embed/channel/vkywg2l6bp>

Non-Agency Provider Resources

- Non-Agency EVV Training Manual
<https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Non-Agency-Guide.pdf>
- Non-Agency EVV Video Library
<https://fast.wistia.net/embed/channel/qkz324kz0p>

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505



Resources

Provider 1-1 Session

- <https://go.oncehub.com/ODMEVVHelp>

Questions

Reach Out with Questions or Issues

EVV Provider Hotline:

For help with a device or the EVV Portal, call 855-805-3505 or email ODMCustomerCareEmail@sandata.com

Hours of Operation:

- ▶ Mon-Fri, 7am-8pm
- ▶ Sat-Sun, 9am-5pm

ODM EVV Team:

For general EVV questions, email ODMEVV@Sandata.com or leave a voicemail at 614-705-1082

ODM Provider Assistance Hotline:

For help with changing contact information in MITS or claims questions call 800-686-1516

